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Intake: Streamlining Social and Health Services Enrollment Webinar

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Name: Intake: Streamlining Social and Health Services Enrollment Webinar

Moderator: Jonathan Walters, Senior Correspondent and Human Services eNewsletter Editor – GOVERNING

Speakers: Dave McCurley, Managing Director – Accenture, Global Industry Teams and Human Services for Public Service
Jerry Koerner, Welfare Program Executive – Commonwealth of Pennsylvania
Ray Packer, Welfare Program Executive – Commonwealth of Pennsylvania
Jennifer Lange, ACCESS Program Director – State of Florida

Length: 60 minutes

Unidentified Speaker: Our moderator for today is Jonathan Walters, senior correspondent and editor of Human Services Monthly Newsletter. Please go ahead, Jonathan.

Jonathan Walters: Thanks, Jerry, and welcome to all those who've turned in for today's webinar and thanks to our panelists. Today, we're going to be looking at the issue of allowing greater access to health and human services through the web. We've got two states that, I think, are doing really advanced and interesting work in this area. First around: across Florida when they won an Innovation American Government Award for Project Access and I wrote that up for the magazine.

I subsequently did a 2007 story for the magazine on the subject of web access to health and human services and ran across Pennsylvania which is also doing terrific work in this area. And so we're lucky to have a team of really excellent folks from those two states to help us out today.

First, I want to introduce Dave McCurley who's managing director of Global Industry Teams and Human Services for the Public Service from Accenture, our sponsor for today's webinar. Dave, why don't you go ahead and make some comments. Then we're going to go to Jerry Koerner and Ray Packer. They are both welfare program executives from the Commonwealth of Pennsylvania, and then we're going to turn it over to Jennifer Lange who's program director, ACCESS Florida. So go ahead, Dave.

Dave McCurley: Thanks, Jonathan. On behalf of Accenture, we're very excited to be sponsoring this topic today. All of us who are involved in this business are always looking for new and innovative ways to give people access to the services that they need and obviously this is a very timely topic. Couldn't come at, I think, a more impactful point in time for all of us as you know, we are all facing a huge challenge. The economic crisis that we're facing and corresponding budget issues are really just sort of the worst problem that's probably been around for the last several years. As the states have been experimenting with a variety of these ways to improve access they've been working always to make it easier and to give themselves some tools to be able to sustain themselves in exactly times like these.

So today we have, I think, some very excellent examples, as Jonathan started saying, of some agencies that are really taking some new approaches to solving these problems. You know, I'll get some personal experience from some of these things as well.

With the city of New York, I've seen some of the stuff that they've done as well, where they've used an online ACCESS method like this that really now allows citizens from one point, in one place, to be able to apply for over 35 different programs across 15 different agencies for the city, and they really kind of meld in together local programs, state, federal programs, and giving clients and citizens one place to go for that information. It's very innovative and very helpful particularly as we have a wave of new folks who are becoming users of these systems for the first time.

At the end of the day, even though lots of us have spent a lot of time making these programs work, helping the folks that need these services is at the very heart of what it is that we do. There are a lot of people in the U.S. that are hurting right now and everything that we can do to make these programs easier to get to, easier to find out about and ultimately easier to receive the benefits from, we can just chalk that down to making it a strategic investment in people's future.

So, again, Accenture is very pleased to be a supporter of this community of practice, and specifically of the GOVERNING webinars and I just want to thank the GOVERNING guys for building this community and giving us the opportunity to be involved.

So, Jonathan, I'll turn it back to you and we can get the ball rolling.

Jonathan Walters: Great. Thanks, Dave. So, Jerry and Ray, why don't you go ahead and talk a little bit about your experience in Pennsylvania, and then hopefully, we'll start getting some questions on what you guys are doing.

Jerry Koerner: The first slide then, please?

Jonathan Walters: Yes.

Jerry Koerner: This is just our current COMPASS home page which we remodeled again this past year, actually in October of this year. COMPASS has been around since October of 2001. It was originally a healthcare for families' application, where we did what we call our healthy beginnings program on the Medicaid or medical assistance side in Pennsylvania and we get our state CHIP program through our Department of Insurance.

That was around for about five months until April of 2002 when we added full healthcare benefits all the healthcare benefits we have under the Department of Public Welfare to the program and then we added cash and food stamps at the same time.

We do have a Spanish version of the applications so you can apply online either in Spanish or in English.

If you look at the lower right hand corner of our screen, we have a special area for the community partners to log on with a unique ID and password. It allows them to track applications, but it also has a simplified application process. Rather than going through

the details of approximately 115 pages, the community partner has about fifteen pages that encompasses the same idea.

The middle of the page, in the center area, allows the individuals to select which program to check on which programs that they can apply for.

The other key feature on this screen is you can screen for all benefits under the program of the Department of Public Welfare that we have to offer plus it allows the individual to look at the National School Lunch Program to screen for that.

Jonathan Walters: Jerry, I noticed you've got other languages up. What are those – that's interesting.

Jerry Koerner: Those other languages are just tag lines, on all our applications and when you click on those tag lines, basically, it says if you need information in this language, please contact our County Assistance Office in your local area and it's 1-800 HELP line where they can call for language assistance.

Jonathan Walters: That's interesting. Thanks.

Jerry Koerner: Ray, do you want to add anything.

Ray Packer: The application has gone through many different iterations as the time when we started in 2001, as Jerry said. And we've continually added programs into the middle of the mix and different pieces of functionality. We added the ability for someone to process renewals for the benefit programs that we administer online as well and have brought in other departments like school lunch and things like that where people can get those services through this portal as opposed to going directly to Department of Education. Those types of things.

Part of the iterations of the software as we've gone through this process was, you know, what do we do with this information, once we capture it. So someone completes the application information and how do we get it to whatever the agency or into the systems that require that information in order to process it for eligibility, regardless of what benefit program it is.

So we've developed some processes where we take the data from that application and we push it out into the eligibility system necessary to determine eligibility. That's eliminating data entry work on our operational staff that have to process each for eligibility. That helps improve the efficiency of it as a whole.

Again, there are a number of different iterations from these or in the background which you don't really see and some that you see upfront with the user.

Jonathan Walters: Jerry, before I go to the next slide, we have a question that I think is best taken care of upfront in your presentation. And that is, does the state run this, manage this web page, the web site or is it an outside contractor that does it?

Ray Packer: This is the state's program.

Jonathan Walters: Okay.

Ray Packer: The Commonwealth of Pennsylvania owns all of this. We use various vendors for different things, and in development of software and so forth, but that's really just part of the business process on how we get it out. The state manages it as a whole.

Jonathan Walters: Got it. Next slide.

Jerry Koerner: The next slide just shows the various programs you can apply for. Here are the current programs that we have online; I'm not going to go into detail on many of them. But the ones we have recently added is our select plan for women's programs, which is an 11-15 waiver for our family planning services, and the other one we're really proud of is the childcare application at the bottom of the screen. We can go to the next slide.

One of three things the users can do is renew online but also we have a portal that's called MY COMPASS ACCOUNT where the individual, if he logs in and signs up on that, can actually report changes online and check on benefits that will give him the amount of food stamps, the amount of cash they're receiving if they're on those programs, and it will tell them what programs under medical assistance they're on. It strictly narrows on the DPW, Department of Public Welfare side, the benefits, but we're planning on in the near future expanding that so they can link into the Department of Insurance, the CHIP, the adult basic programs. Adult basic is a medical program, run by the Commonwealth of Pennsylvania for those adults that do not meet the federal requirements and it's a state funded process.

I'll let Ray talk about the county staff and anything else on this slide.

Ray Packer: One specific note on the MY COMPASS ACCOUNT to give you a little bit of context of how that functions within our agency, we set this up similar to what a bank would set up in an online account. So that a user that signed up for the MY COMPASS ACCOUNT would be able to come in and get the basic information about their household: what they're receiving, when their next payments are due, when their renewals are due; be able to link out into those activities if they wanted to completely renew online, as well as report those changes that we would route it off to the office throughout the state, then we'll be responsible for making the updates to those particular cases. So there's a lot of information there. We provide information on their healthcare benefit packages, so that they know what kind of coverage they have based upon the medical assistance category they're receiving. So it is very, very beneficial to our clientele with the information that we've provided there as opposed to making those direct contacts to our local offices. So that saves our offices time when having to deal with those questions because they can obtain that information online as well.

Jerry Koerner: Next slide, please. Some of the future enhancements; we're going through a process right now of really simplifying the language on COMPASS and see if we can streamline or cut down the number of questions we ask in the COMPASS application itself. Because when we built the application, we initially built it under a healthcare platform and since then we added various programs, we have a lot of questions that are similar and we want to get rid of those, so we're going through an extensive process right now of simplifying that language and that should hopefully be up sometime this summer.

The other thing we're doing is changing or simplifying the screening process. Right now, we screen for all the programs independently and it is really, unfortunately, blossomed out to this big flower rather than a little rosebud that we want. We're trying to get back to simplified screening and trying to keep it at the household level, if at all possible, so an individual could screen for within less than five minutes.

What we'd like the individual to do is put the basic demographic information in, some income information and other pertinent factors, and then show the person that's screening the end results for the household for what they potentially could be eligible for.

I'll let Ray talk about the scanned documents that we're planning on bringing on.

Ray Packer: We have been working on this particular item for a couple of years. Not actually working on it but wanting to work on it. And we finally have gotten the ability to move forward with this particular project where, when someone completes an application online, we're going to provide the ability for them to attach their verification documents to the application so that it'll follow the application to the source that needs to process it for eligibility, or to the target destination at least, and then they'll have those documents available to them at the time they need to do that work. We'll provide them the ability to attach them directly to it and follow the application. It's a big deal for us and we're in the middle of that particular project at the moment.

Jerry Koerner: And the last slide. Lessons learned along the way. Again, get all your departments or agencies involved, get community partners involved, advocates, and use this even from the, what we call, from the street level, the County Assistance Office, people that you really think you should use the application. Ours is a upfront, you don't need to have somebody there helping you put the application in, we did it from a public view, we want it out there for the general public to just go in, log on, and able to apply. But you still need to get the buy-in of advocates and the community.

The other thing is, we took small steps. We didn't put COMPASS up with all these applications at one time. We incrementally built COMPASS. We started out with healthcare, moved to food stamps and cash, and added the programs as we could fit them in to COMPASS. Again, a key thing is we're doing it up in the last line as we tested, tested and tested to make sure that the logic we put in gave us the results we wanted. I can't stress that enough, even on the screen side, we have found problems recently that we felt we didn't have but we have them and we just overlooked it in testing. When we try and get something up too quickly, I think we run into problems. So that's why I say, my last thing is, on my side, is make sure you test the product before you put it up.

Jonathan Walters: Great. We already have a ton of questions stacking up. For those who have tuned in I'm going to hold them. We'll get back to Jerry and Ray. But I wanted to go to Jennifer.

Jennifer, why don't you go ahead and talk a little bit about what's going on with project ACCESS.

Jennifer Lange: Good afternoon, everybody. We have a similar but different process here in the state of Florida for how we run our public assistance program and my next slide has the picture of the acronym for our program, which is, Automated Community

Connections to Economic Self Sufficiency. And just for scope, we're a fairly large state. Our Medicaid caseloads up to 1.9 million people, food stamp is at 1.8 million and we've got about 98,000 on cash.

Our biggest challenge, or opportunity at the moment, is the economy and it's really having an effect on our caseloads. In less than two years, we've more than doubled. We've gotten a 50 percent increase in our food stamp caseloads and just before that started happening, between 2003 and 2006, we went through a downsizing on a re-engineer ourselves, and we cut our staff by 43 percent, so it's a challenge but it is a much faster, more streamlined, process than we had before.

We've added a lot of technology to our process. We've added community partners to our process but we thought one of the other important things was, we looked at our policies and our procedures and we found things in there that we could streamline and make go faster for people. We used to say, you know, the main thing you did in our offices was wait and we resolved that.

We're trying real hard on the no-wrong-door approach. We got about 90 percent of our applications coming in electronically, at this point. And of those, 85 percent are coming over the internet, which means people's homes, businesses, community partner sites, wherever you can get access to a computer. And about 15 percent of the 90 percent are coming in over the intranet from lobbies that are in offices that we've reconfigured and you'll see a picture of that in a few minutes.

We, about six months ago, added a My Account system, similar to Pennsylvania's, where people can go in and check the status of their account, print a Medicaid card, get information on appointments or verifications, and we think that's pretty cool. Next slide.

This is a picture outside of one of our community partner locations. We have a network of over 3,200 partners that include things like food banks, hospitals, health units, libraries, just places where people in our communities can get access to our services. And most of the time, that means get access to a computer and we do have, you know, paper applications available at some of the sites. Most of our partners partner with us because it's the right thing to do when we have mutual clientele and they don't charge us anything. But we do have a few that we pay a small amount to, to try to offset some of their other expenses.

The next slide, you can see some pictures of our call centers. We have one in Tampa, one in Miami and one in Jacksonville. This is an example of how we tried to specialize our staff. We pulled our staff off into these call centers several years ago. We've got about 500 people total that staff them about 350 of them are eligibility specialists. And they answer, they provide general information, they answer questions and they also process reported changes in our eligibility system.

When we pulled staff off to do the call, we also pulled out specialized people in what we call Case Maintenance Units. And these people handle data exchange and bill tracking. Kind of like, it's the changes that are not reported by the client. And we found that that's helpful to us in getting that kind of work done because in the old model, that work, a lot of times, got left to the wayside. So we think that specialization is helping us out.

And then we've also done some specialization in our intake and processing. We started out, like that was kind of all the same group. The people that process the applications and reviews, and then we found out that we could even further specialize into the intake and the processing group. Next slide.

In this case, you can see in the middle is one of our new web rooms, where people can go into our own lobbies and use computers to apply for our benefits. And over to the left is a picture of a lady, in her own home, with a laptop. Where it's the idea of "we need to bring the services to the people instead of making the people come to us" and we think that's pretty good.

The back room processors can basically be anywhere. We kind of learned that on a hurricane experience a few years ago, where we needed to move the work to the areas that were not hurricane impacted and that was kind of one of the silver lining lessons we learned on the hurricanes.

The local offices that do the intake, they do almost all of their interviews by phone and many of them have a separate 800-number that is not the call center number for general information and changes. We're looking at whether we should change the way that is, but right now we're not doing that.

The one of the big things that helped us in our specialization is we are state-wide on our document imaging process so all of our case records are electronic. No matter where you're processing the case from, no matter where you're sitting at a call center, you have access to the electronic case record, including all the verifications that have come in and been scanned into imaging.

And we think that that's really helping us as we move forward and we've built some technology in for workers. As an application comes in, we have tracking systems so that those applications don't get electronically lost. And we always know where we are on particular cases and we can pull some really cool reports that help our managers to manage this increasing volume of work.

The other advantage of going electronic is, we're more flexible and we have a lot of staff at this point who are telecommuting, which means they can do their work from home. And when we don't have any money to give them a raise, it's a nice thing to be able to let them telecommute because then they save the money on gas and we find that they don't have as many distractions and they can actually process applications, in many times, faster than somebody who's in a regular office.

Jonathan Walters: Jennifer, you should be a fortune teller because that's a question that just popped up.

[LAUGHTER]

Jennifer Lange: Last and I'm about to close. I'll try to be quick. But last week, we started something that we've been working on for almost two years. We have this group called the Benefit Bank that's been working with the city of Miami. And they've wanted an integrated application process because we do cash, Medicaid and stamps, refugee assistance, on our application, but, we don't do the earned income tax credits. The federal government does.

We don't do, city of Miami services. The city of Miami does that. But with this new process at the city of Miami offices, which is where the pilots are, people can go in on this Benefit Bank type application, put in their data, and then when they eSign, it sends the data we need, it sends to us. The data the federal government needs for earned income tax credit, it sends to them.

And so far, nobody's sent us an application. We're waiting every moment. Has anybody sent one because we just opened it up last week? But we think that has a lot of potential for helping people get the services they need. And I'll conclude. Thank you.

Jonathan Walters: Great. Thanks, Jennifer. We're going to open up for questions now. One of the first ones that just came in—I guess, Jerry and Ray, why don't you take a shot at this and then Jennifer—it's how do you guarantee the privacy of protecting the client personal information when employees can display it in their homes? How do you handle that and have it on computers at home?

Jerry Koerner: It's the information on the computer at home, but we say - this is a secure mechanism, obviously, this County Assistance Office, that we send the information to.

Ray Packer: Once the application is submitted, then it's only accessible by our county offices. And if it's in a pending state where it has not been submitted yet, either suspended or in a status where they haven't finished it yet, and they have to come back to continue the application, they have to log on using the application number and a password to get access to it. Someone just can't open up the application and look at that data.

Jonathan Walters: Jennifer?

Jennifer Lange: Well, a couple things. One, even though it's in their home, the data is never resident on the PC in the home. It's always resident in our mainframe that they get access to. In order to telecommute, you have to sign an agreement about how you won't share this information, you will keep it in a confidential way, and the supervisor can actually go out to your home and confirm that you have your office set up such that the data's confidential and that your family members aren't in the room when you're working, that kind of thing.

Jonathan Walters: Okay. Who administers your system? How does it run in Florida?

Jennifer Lange: It's also the state system. We own it, we're responsible for it. The programmers on it are a combination of state staff and contractor staff.

Jonathan Walters: Okay. Jerry and Ray, then Jennifer. A couple questions about concerns of the relative computer literacy of folks out there who might be applying for benefits. How do you handle the possibility that you might be losing an important demographic, who's just not tuned into this sort of technology as a way to gain entrance into your system? Jerry or Ray?

Ray Packer: Well, primarily, we look at it from a couple of different aspects. First is continuing to try to educate our clientele. Secondly, the initial application, our applying

for services application, is built based upon an education level of 5th grade. Then, third, for those that are more of a power user, that do this on a regular basis, our community partners, that's where we have the condensed version that doesn't have all the help text and everything associated with it that allows them to get through those applications faster.

Jerry Koerner: When we first brought up COMPASS, we had skeptics out in our counties and in a lot of the systems offices saying that people don't have computers and don't understand computers and stuff of that nature. And I think that it's a perception that is a 1980 perception. It's not a 2009 perception. There are probably 40 percent of the households in the United States or at least in Pennsylvania have home computers and use them on a regular basis. And it's getting to be more and more that way. A lot of those families and some of our citizens actually use the high school or 8th grade child to help mom and dad with the application.

Jonathan Walters: Sure. Jennifer, I know you talked a little bit about this, but Jerry and Ray, do you get a sense what percentage of your applications now come in via the web versus the traditional?

Jerry Koerner: A little over 20 percent of our applications come over the web.

Ray Packer: 20 percent over the web.

Jerry Koerner: That's a gradual increase over the years. It seems like each month it creeps up a little bit more. Our goal is to, within the next couple of years, is to increase that even closer to 50 percent, if we can.

Ray Packer: We encourage the utilization but we don't force anybody down the path. We provide as many options as possible.

Jonathan Walters: Jennifer, since you guys have been pretty active in trying to partner with outside agencies, not for profit, we have a question. We hear from many of the public libraries, or client internet resources, have you seen that, and are there other resources outside of human service organizations where folks can go in and access services in Florida?

Jennifer Lange: Yes. The libraries are an important partner and it is their common goal to provide people with access to information so we do have that. But the partners are real varied, for example, hospitals are very interested in being a partner because they're very interested in getting eligible people on Medicaid. The food banks, they're integrally linked in. If they can help somebody to get on food stamps, it takes some of the pressure off of their food resource issues. But just a variety of people, social service groups with 3,200, it's a lot of places around in the community.

And we think that they've been important for people who maybe were a little more scared at the beginning to use the computer, that if a partner was there, it seemed more user-friendly. And we also found because we've pushed our web application, we say to people, give it a try. We have a survey at the end of our application and 40,000 people a month fill out the survey. And one of the big questions is, "Would you do it again?" And 96 to 97 percent say, "Yes." "Once I've done it again, I'm not afraid of it;" "I'll do it again;" "It wasn't that hard;" "Took me less than half an hour."

And especially, well, think about the elderly. They required help anyway even with the old paper process. But we've had people that came down, they don't do it anymore, they've learned, but they walk into our lobby and say, "I'm here. I need to reapply for my mother's nursing home benefits," and then they get directed to a web room and they sit in front of a computer. And that lady said, "Wait a minute. Wait a minute. I just flew down here from New York, so that I can recertify for my mom. I have a computer in my living room. You mean I didn't need to come here?"

Jonathan Walters: Yeah. [Laughter] Well, in fact, a comment just popped up on the Q&A. "I just helped a young lady and her husband and children move to Florida. She's pregnant. I was skeptical of the online process, however, services create the online access, the application process was very user friendly. I was impressed."

A number of questions about the cost of these systems versus savings. Jerry, Ray, what did it cost to get this thing up and running? I understand that it's been a long, sort of fazed process. But do you get a sense of the development cost, operating cost, versus what it's saving you maybe in FTE's?

Ray Packer: Well, our initial cost to start up was probably, if I recall correctly, in the \$1.5 million range. And then as we added on through the years and continued to enhance the product, we basically just continued to prioritize the different segments as we wanted to expand through the course of that out of what we had allocated towards our overall IT budget and work through it in that regard. And generally, we were talking anywhere from probably \$500,000 to a million during the course of each individual year in order to continually increase the utilization of the product and the functionality within the product.

I don't have an FTE number associated with it at this point. Our original focus, when we brought this on was to increase and enhance the options for someone to utilize the application. So it was more coming from an ongoing customer support standpoint than from the utilization of our staff within our offices. However, due to loss in the staffing that we've had over time, it's become a definite benefit not that we've specifically saved FTE's but we've lost FTE's because of budget cuts and those types of situations within Pennsylvania so this has actually helped that to a substantial degree.

Jonathan Walters: It sounds that that sort of softened the blow.

Jerry Koerner: It did, yes.

Jonathan Walters: Okay. Interesting. And I know, Jennifer, you guys have made some dramatic reductions of FTE's. We have a question here, how much was staff actually reduced as a result of the implementation? Also, what types of positions were reduced or eliminated, i.e., clerical versus caseworker, etc?

Jennifer Lange: Reduced our staff by 43 percent which is about 3,000. We did almost all of it over the course of that time with people who just left and we didn't fill the position. But the positions that we lost were a variety: clerical, caseworkers, supervisors, managers, the whole gamut. In the end, the money that we saved on staffing and the expense and the lease costs and stuff to support that staff, early on, we used part of that for the early technology that we had to invest in the process by—I got some notes here.

The automated response unit and the phone system capacity things for our call centers were close to \$11 million. We had to upgrade some PC's at \$3.6 million. We needed some more licenses, different kinds of things. If you add all of that up for those early investments, you'd probably get into the \$15-20 million range but all of that was coming out of the savings that we were accruing as we were downsizing and by the time we got to the end of 2006, we were saving the state and federal government \$83 million a year.

So, those early investments that did not come from new money but since we came from the early pieces of the downsizing and got reinvested are paying off. We're still working to increase our technology and make it better but we're basically doing that with existing computer resources that we've had in support of the program.

Jonathan Walters: Okay. Sort of a related question again. Jerry and Ray first. Were these systems built for ease in making changes, for example, when the legislature changes the program or the Feds who seem to do this frequently? You have to change eligibility requirements or some, you know, or some other aspects of how you're working, so how quickly can you make those changes? Do you have to hire a vendor to do that?

Jerry Koerner: Well, we have a vendor that that does a lot of the work on it, and also through our IT staff. But usually we make changes three to four times a year, major changes we've put in. We have a new program. It probably takes three to six months to get a new program up. I'll let Ray chime in.

Ray Packer: I mean, as far as making changes, it varies based upon what that need is. If there's an immediate change, it's necessary because of some legislative change then we have to act more quickly in those situations. But typically we can plan it out over the release schedules that Jerry spoke of.

Jonathan Walters: Sure, okay. Jennifer, how about down in Florida?

Jennifer Lange: I'm sorry. Could you restate the question?

Jonathan Walters: Yeah. The question was, how quickly can you make changes to the system based on changes in program requirements and rules?

Jennifer Lange: Well, we really haven't found that to be too much different than it was before. I mean, if we have to change, we have to change. We have staff at the technology center who are funded in what we call maintenance and operations, which means, it's their job. We expect we're going to have changes that people need to make, fixes that people make. As we've added new systems, of course, you know, there's more potential for having to make changes to more systems.

Karen O'Brien's our technology chief here with me. Maybe she has a different opinion, but it seems to me it's the same as it was before. You just got to do what you got to do.

Karen O'Brien: It's upon demand as we have requests from the legislature or policy change. I mean, our on-board state and contract staff can make the change.

Jonathan Walters: Question. Again, we'll go to PA first. Were these systems built internally? Would any of these systems be available to be shared as a transfer system to another state? I see an income opportunity. Jerry and Ray?

Ray Packer: Well, they were built internally. However, the Commonwealth is the proprietor of the software. So as such, it is public domain. So we can share this information with other states. Now, it's not necessarily a plug-and-play, because your regulations whatever your state is would come into play in how you would administer the programs and the different items that are associated with it, but utilization of the software within it, sure, that's a possibility.

Now there is some software that was used to develop it with, that the vendor had, but and still use it in some regard but the sharing of the software is not a big issue.

Jonathan Walters: Okay. And for those of you who have tuned in on the slide that's up now, you can see the web address at which this will be posted. Along with that will be the contact information for the panelists, so you can make direct contact with these folks, with these sorts of questions, and you can follow up.

Jennifer, how about how it works down there?

Jennifer Lange: It's also a public. The state of Florida owns it and, yes, we can share it. In fact, on our document imaging programs, we gave the program to the state of South Carolina. They were happy to get it and then they had to retrofit it to fit their system, but they say they saved a whole lot of money on doing imaging by taking our process, figuring out how to fit it into theirs. It's government stuff.

Jonathan Walters: Yeah, got it. Again, Pennsylvania, is this also a payment system for providers and recipients?

Jerry Koerner: No. We've paid for services out of what we call the promise system. The providers could submit applications under this program but they cannot submit their bills for payment. That's a separate system we have within the commonwealth.

Jonathan Walters: Jennifer?

Jennifer Lange: We actually have several systems and they talk to each other, but they're different.

We make our cash and food stamp payments off of something we call the Florida System, which is the mainframe that we had before, that still is like the brains of the operation, and produces the benefits.

It's talks to the Florida Medicaid Management Information System for the provider payments, but it also, in a weird kind of way, talks to the web application and the tracking system. Not as fluently as we would like it to, but we see as the way of the future.

Right now, we screen data from a web application into our mainframe and that works real well for demographic data and it works okay but with bulk for the income and asset stuff, but still we don't have people who are sitting there all day just re-keying information like they used to. And the plans we have in place for how to make ours better will automate that even more.

Jonathan Walters: A question from my friend, Jack Prescott. Jerry and Ray, then Jennifer. The effect of these systems on the ever pesky issue of error rates.

Ray Packer: I can't say that we've had a positive effect on the error rate as a definitive answer. However, our error rates are pretty good within Pennsylvania itself. We've gotten some food stamp bonus money the last few years because of our error rates. We do believe though that our COMPASS applications, because of the data that we collect and the way we structure the questions as being dynamic based upon program, that we assure the collection of the information associated with the eligibility determination that it improves our error rate. But I don't have any specific definitive statistics to back that up.

Jonathan Walters: How about in Florida, Jennifer?

Jennifer Lange: Well, I'm pleased to say that, at the moment, we are ranked number one in the country. [LAUGHTER] And last year, we got a Federal bonus for most improved. I think that the technology and the specialization can help you. Our error rate wasn't too good earlier, hence, the most improved. But I think once we got through the initial bumps of what were we going to do on efficiency and we could spend more time trying to figure out how to make this thing work for us on payment accuracies, we got over that hump.

Jonathan Walters: And for Jennifer again. Do you train your community partners' staff on a combination? If I recall correctly, you provided them with some surplus equipment, right?

Jennifer Lange: Yes. Both. We have specialized staff around in our communities that are charged with being liaisons. And they give them training on confidentiality in the application process. We've got some really cool training on My Account that we've been able to post to our internet forum, and early on, though, we didn't pay very many of them. When we downsized by 43 percent. That meant we had a lot of surplus computers. We gave a lot of those computers to the partners so that they could provide the access points.

Jonathan Walters: If an agency wanted to conduct a site visit to observe systems in PA and Florida, that'd be okay? And again, I'm assuming that would be okay and we're going to have the contact information for those folks on the panel up, but you guys are amenable to those tours, I'm imagining?

Ray Packer: Sure. We've done it many times already.

Jonathan Walters: We have a question just to clarify some numbers. Jennifer, the percentage of folks who you have applying online?

Jennifer Lange: 90.

Jonathan Walters: 90. And so there's a question about the 20 percent in Pennsylvania versus 90 in Florida. It might take a reporter to do an analysis of the difference, but Jerry and Ray, do you have any guess as to why you guys may still be a little bit low versus?

Jerry Koerner: Well, number one is we don't basically require them to apply online. It's one of many tools from where individuals can apply for benefits. And it was designed

that way, not to force people to apply online. We have the paper applications for our programs. We still offer them. You can apply through the community partners. We wanted to make it just business as usual with no significant change in policy across the board.

Ray Packer: One additional medium for someone to get their information to an office that needs to process them for eligibility.

Jonathan Walters: Got it. Question on handling issues of fraud. Did the fraud rate increase with all its electronic applications? I don't know. What do you guys do? You've got to spot audit? So how do you handle it in Pennsylvania?

Ray Packer: We have not had any increase in fraud. And that's basically because the requirements for the program remain the same, regardless of what the medium it is to submit. There's been no marked increase or decrease. It is what it is.

Jerry Koerner: Early on, and again, this has been a number of years, the Office of the Inspector General did go out and check the COMPASS application against paper applications for accuracy and found they had a higher accuracy rate on the COMPASS application information provided than on the paper applications. It's been about five years since that's been done. And they saw no reason to not accept them.

Jonathan Walters: Sure, okay. Jennifer, down there, the fraud issue?

Jennifer Lange: You know, we agree with Pennsylvania. We don't see that's it's made any difference.

Jonathan Walters: The trends in the number of folks applying for services? Have either state seen increase in applications for services since the web program has been implemented? Jerry and Ray?

Ray Packer: I think it's actually more tied to economic conditions.

Jonathan Walters: That would be my guess, as well.

Jerry Koerner: We got an increase in the medical assistance individuals increased this month by almost six percent, seven percent. I see it economic circumstances that increases the application, not just the availability of the application.

Ray Packer: Although, given the current economic conditions that we face, the folks that are coming in now in the greater number of that population is a ratio being computer literate is going to be higher.

Jonathan Walters: Jennifer, your sense of the extent which is that the technology in and of itself has had an effect on applications?

Jennifer Lange: We agree that the larger effect is the economy because we can clearly see it in our numbers. It turns in April of 2007. But we also think that the web application makes it easier for people to get to it. And we were seeing, especially early on, more people who were applying who were ineligible. And I think what's happened with the economy is they're still applying but now they're eligible.

Jonathan Walters: Oh, okay, sure. Questions of sharing case files and data across agencies. How do you help and obviously this is the whole issue of confidentiality that arises with that? Jerry and Ray, how have you guys dealt with this?

Ray Packer: We don't really share case files, per se. We share information associated with individuals, like demographic information with a master client index that other subscribing agencies use. So, that we're sharing the same information on people so that we're not duplicating efforts across agencies. Some agencies that require some of the information from programs that we administer in conjunction with the programs that they administer, we will give larger, global answers to if they're seeking something as opposed to specifics so that we don't get into any confidentiality issues.

Jonathan Walters: Jennifer, how do you handle it down in Florida?

Jennifer Lange: We have real secure, I'm not a techie, firewalls around data. And then we share the data that the other agency needs to have. For example, between the agency for healthcare administration which pays the bills on the Medicaid and our department that does the eligibility, we send through a secure portal, the information on who's eligible. We do a secure interface with our Florida's Healthy Kids Corporation on children that apply for Medicaid but aren't eligible because of age or income. So that we send them the information they need in order to initiate an F-CHIP application on the other side. So our programmers are pretty good at building walls around our data before we share it.

Jonathan Walters: Got it, got it. Dave and Jerry, a quick question on how long does it take for applicants to know if they're eligible and are they told quickly additional information that they need to provide in order to become eligible?

Jerry Koerner: Let me answer the first question. They put the information in as a new application; COMPASS will actually tell them what additional information they need to provide to be eligible, to include proof of citizenship, or income, all the information based upon the program that they applied for. Which it comes up right upfront, it says, you know, you still need to provide this information to determine eligibility. Again, we have – we still have a 30-day processing time within the CAO's for eligibility. The insurance department has a 10-day processing time for a CHIP application. So those processing times haven't changed but then again, general information we receive from the CAO's is that they would handle the COMPASS application a little bit quicker than the paper application cause the information's there and I think the processing time is probably a little bit quicker but we don't have any definitive numbers to prove that.

Jonathan Walters: And then, Jennifer, how about down in Florida?

Jennifer Lange: It's taking us an average of 18 days, right now, to do a food stamp application. We would like to be quicker, especially on the expedited. We do fine but doing even the phone interview on an expedited food stamp case is a real challenge in the new system. But what's caused – we were quicker, you know, maybe 14 to 16 days there for awhile. But with the kind of volume we're experiencing, you know, and the 50 percent increase in caseload in 22 months.

Jonathan Walters: Yeah, yeah, I understand.

Jennifer Lange: Good.

Jonathan Walters: We're rapidly running out of time. I'd like a last question for Dave or Jerry, Ray and Jennifer. Jerry and Ray, some fundamental lessons learned. As you move forward on this process and started building the system. What are some of the key things that other states ought to keep in mind and know about and then maybe not have to go through that you went through as you were building this system?

Jerry Koerner: Well, one thing I always tell anybody. And I've done a number of presentations nationally on COMPASS to some of the CMS conferences, and one thing I always say is, never let the technology people drive the product. Allow the policy people, allow the human interest people that are going to use it, really drive the product. And when we first developed COMPASS, the IT people came back with a product and absolutely nobody liked it. And we gave them a short time period to do it in, so we said, okay, you need to get everybody involved, not just taking your idea and concept of what's going on. They made it very difficult. It has to be simple, it has to be understandable and kept, as Ray said, based on a 5th, 6th, 7th grade reading level. And the screens have to flow naturally. I don't want to pick on the IT people, but I will. They sometimes think of a process to get things done and it'd be quicker to do it this way, rather than somebody on the outside looking in on how to process what it means to them.

Jonathan Walters: We have one of our attendees just sent a message about your message about how you take control of the process versus the tech people, "Amen to that."

Jennifer, you have the last word on things to keep in mind as you're putting together a system like this?

Jennifer Lange: Don't let the naysayers tell you can't do it, because you can. Just find a way around and have confidence that you can do it, that you can improve the system. And if you build it, they will come.

Jonathan Walters: All right. I want to thank everybody who tuned in to the webinar today. I want to thank Dave, Jerry, Ray and Jennifer.

We had a ton of questions. What we're going to do is we will bank those questions and farm them out to the appropriate folks around this panel. Contact information for our panelists will be up on the GOVERNING web address that's on the screen right now within 24 hours. Feel free to tune in there, and ask these folks questions very directly.

And again, thanks to everyone who tuned in and thanks very much to our panelists. You guys did a great job.

Jerry Koerner: Glad to be able to participate.

Unidentified Speaker: I want to take this time to thank everybody for joining our event. You may now disconnect.